SENIORS' HOUSING REPORT
Alberta

CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2013

Highlights

- The overall vacancy rate for a standard space in retirement homes across Alberta was 10.2 per cent in 2013, compared to 11.3 per cent in 2012.
- In Alberta, the overall average rent for a standard space was $2,798 per month in 2013, up from $2,691 in 2012.
- The 2013 survey covered a universe of 10,160 standard and non-standard spaces, up from 9,715 in 2012.

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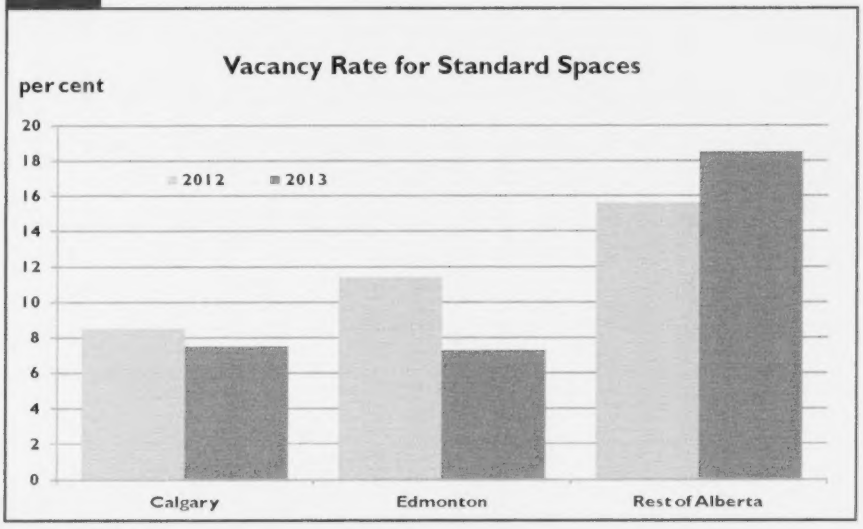

Source: CMHC

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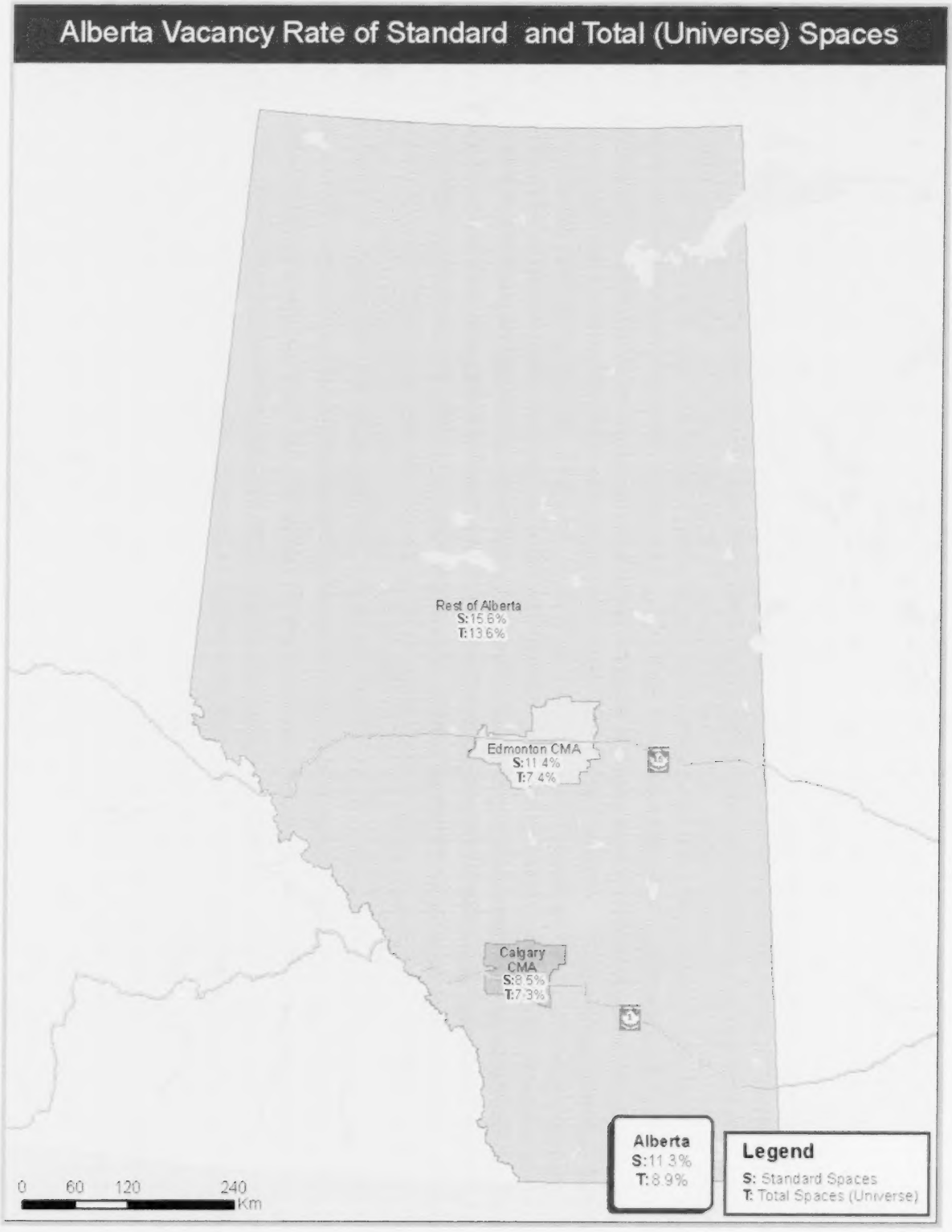
Alberta Vacancy Rate of Standard and Total (Universe) Spaces



Vacancy Rates

Vacancy rates moderate in 2013, yet remain elevated

CMHC's survey of retirement homes in Alberta found that the average vacancy rate for a standard retirement space in 2013 was 10.2 per cent, down from 11.3 per cent in 2012. Within the Calgary Census Metropolitan Area (CMA), the vacancy rate was 7.5 per cent in 2013, compared to 8.5 per cent in 2012. In the Edmonton CMA, the vacancy rate decreased to 7.3 per cent in 2013 from 11.4 per cent in 2012. The vacancy rate in the remainder of the province increased to 18.5 per cent in 2013, up from 15.6 per cent a year earlier.

Provincially, the vacancy rate for standard spaces was highest in one-bedroom units, at 10.9 per cent. This represents a modest reduction from 11.4 per cent vacancy last year. The vacancy rate for both standard bachelor spaces and two-bedroom and larger units was 9.3 per cent in 2013, down from 10.9 and 11.4 per cent, respectively, in 2012.

In Calgary, the lowest vacancy rate for a standard retirement space was recorded in units with two or more bedrooms at 2.7 per cent, on par with the previous year. The highest vacancy rate was posted in one-bedroom units, at 9.5 per cent. As was the case in previous years, the situation in Edmonton was reversed. Vacancy rates for standard retirement spaces in Edmonton in 2013 were highest in units with two or more bedrooms, at 8.6 per cent, and lowest among one-bedroom units at 6.9 per cent. All bedroom types in Edmonton recorded reductions in vacancy compared to 2012. In areas outside Alberta's two biggest cities, vacancy rates for standard spaces ranged from 19.8 per cent in bachelor units to 18 per cent in two or more bedroom units.

As was the case in 2012, vacancy rates across Alberta this year were lowest among standard spaces renting for less than $1,500 per month. These spaces had a vacancy rate of 4.9 per cent in 2013, compared to 6.8 per cent a year earlier. The highest vacancy rate was found in spaces renting between $1,500 and $1,999. The vacancy rate in these spaces was 14.1 per cent in 2013, up from 11.4 per cent in 2012. The vacancy rates in Calgary were lowest for standard spaces renting between $1,500 and $1,999 per month and highest for those renting between $2,500 and $2,999. In Edmonton, the lowest vacancy rate was for standard spaces renting for less than $1,500 per month and highest for spaces priced between $1,500 and $1,999.

Vacancy rate of Heavy Care Spaces remained stable in 2013

Heavy care spaces are classified as spaces in seniors' residences where the residence provides 1.5 hours or more of health care per day to the resident. In Alberta the vacancy rate for heavy care spaces was 3.6 per cent in 2013, effectively unchanged from 3.5 per cent vacancy in 2012. Vacancy rates moved up in both Calgary and Edmonton, while the vacancy rate was lower in areas outside of these two cities. As was the case in 2012, the vacancy rate for heavy care spaces in 2013 was lowest in Edmonton, at 2.3 per cent. This compares to a vacancy rate of 1.1 per cent in 2012. Calgary's heavy care vacancy rate was 4.9 per cent in 2013, up from 2.2 per cent one year earlier. The vacancy rate in the rest of the province was 4.7 per cent in 2013, compared to 9.7 per cent in the previous year.

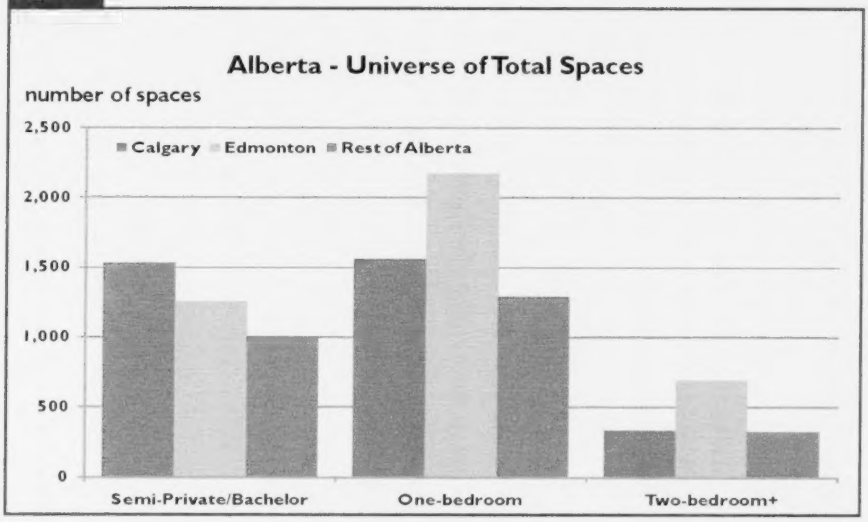
Universe of Retirement Spaces

CMHC's seniors' housing survey covered a total of 10,160 retirement spaces in 2013, up from 9,715 in 2012. The majority were identified as standard spaces, which totalled 6,765. The remaining were non-standard spaces, which included heavy care spaces, non-market or rental subsidy spaces, and some spaces being used to provide respite care. Overall, the survey universe in 2013 grew by 4.6 per cent from a year earlier, following an increase of 3.0 per cent in 2012.

About three-quarters of standard spaces in Alberta were located in the province's two CMAs. Calgary's universe in 2013 included 2,720 standard spaces, while Edmonton's was 2,237. Non-standard spaces accounted for a larger proportion of the universe in Edmonton than in Calgary. About 30 per cent of Edmonton's universe was made-up of non-standard spaces, compared to just 20 per cent in Calgary. At the provincial level, non-standard spaces accounted for 27 per cent of the universe.

Among standard spaces in Alberta, one-bedroom units remained the most common. These units accounted for 58 per cent of all standard spaces in the province in 2013, a small increase from the 55 per cent recorded in 2012. Semi-private/ bachelor spaces were the second most popular type, with 1,748 spaces, or 26 per cent of all standard spaces. The largest units with those with two or more bedrooms made up the remaining 16 per cent of the universe of standard retirement spaces in the province.

Figure 2



Source: CMHC

Semi-private/bachelor spaces were more common in Calgary than in Edmonton, accounting for 33 per cent of all standard spaces in Calgary compared to 20 per cent in Edmonton.

Spaces in semi-private/bachelor units in Alberta accounted for 72 per cent of non-standard spaces, followed by one-bedroom units, at 25 per cent. Spaces in units with two or more bedrooms made up over three per cent of all non-standard spaces.

Services and Amenities

There are a number of amenities and services typically offered at Seniors' residences. Many of these amenities, which are not generally found in the purpose-built rental market, include medical services, on-site meal plans, and various entertainment and recreational activities. Only those facilities that provide an on-site meal plan were eligible for CMHC's Senior's survey. In Alberta, 62.6 per cent of structures surveyed included three meals in the rent, up from 58 per cent in the previous year. Meanwhile, residents in 3.8 per cent of structures surveyed had the option to participate in the meal plan or not, slightly higher than in 2012. As was the case in previous years, a 24-hour call bell and an exercise facility continued to be the most common amenities in structures surveyed in Alberta, followed by on-site medical services.

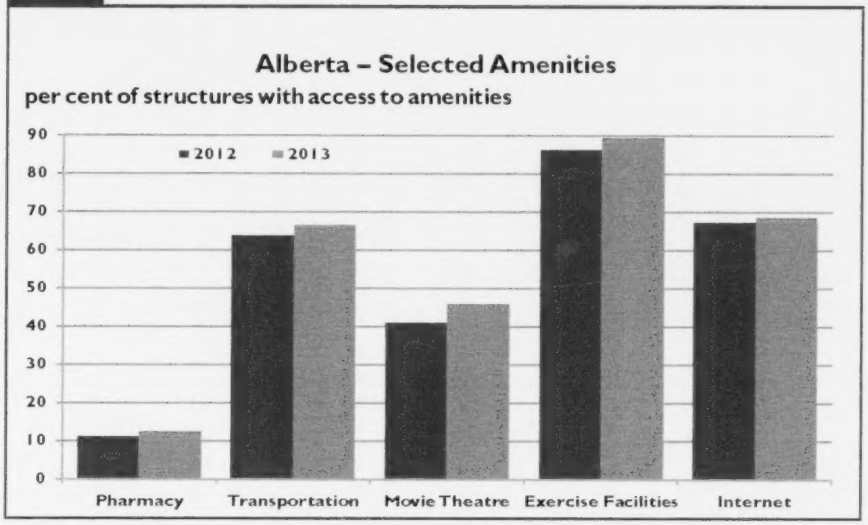
In Calgary and the Rest of Alberta, some amenities were offered in a similar proportion of seniors' structures, notably a 24-hour call bell service. However, many amenities identified in table 2.5 were found in a higher proportion of structures in the Calgary CMA than in the Rest of Alberta. For instance in Calgary, transportation services were found in 89 per cent of structures surveyed, compared to 57 per cent in the Rest of Alberta. The difference was also pronounced for movie theatres and internet access, with a higher proportion found in structures in Calgary than in the Rest of Alberta.

Rents

Average Rent for Standard Units

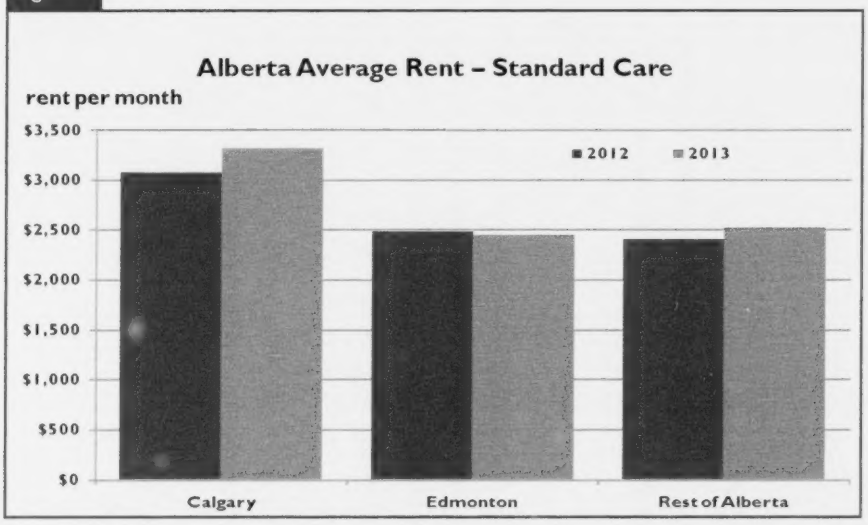
For all bedroom types, the average rental rate for a standard space in Alberta was $2,798 per month in 2013, up from $2,691 in 2012. The additional services and amenities provided to residents contribute to the higher rents in seniors' facilities

Figure 3



Source: CMHC

Figure 4



Source: CMHC

compared to accommodations in the purpose-built rental market.

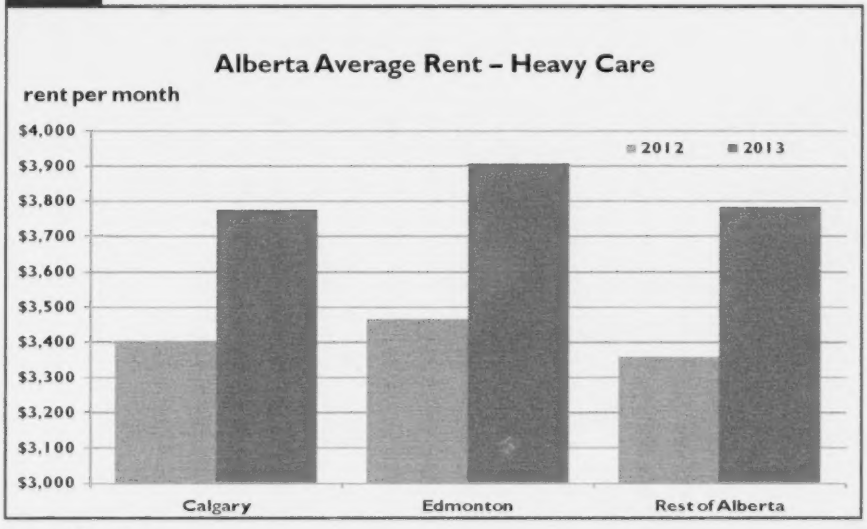
Standard spaces in Calgary and in the Rest of Alberta all reported higher average rents for every bedroom type in 2013 compared to 2012. The average rent in Edmonton, on the other hand, was down compared to 2012. Edmonton also recorded the lowest average rent for all bedroom types, averaging $2,450 per month while the Calgary CMA reported the highest at $3,314. For bachelor and one-bedroom spaces, the rent in Edmonton averaged $1,817 and $2,419, respectively, which were below the rates in Calgary and the Rest of Alberta. Two-bedroom plus units in Calgary had an average rent of $4,321 in 2013, compared to Edmonton at $3,151 and the Rest of Alberta at $3,355. All bedroom types in all areas had higher rents than in 2012, with the exception of Edmonton where one-bedroom rents declined slightly from the previous year.

The majority of standard spaces in Alberta were rented in the higher price ranges. Only seven per cent of standard spaces in 2013 had an average rent of less than $1,500 per month, while 64 per cent of spaces reported an average rent of $2,500 or more. The CMAs had a higher proportion of units in the upper price ranges than the rest of Alberta. Over half of the standard spaces in Calgary recorded an average rent of $3,000 or more. By comparison, the highest proportion of standard spaces in Edmonton was found in the rent range between $2,500 and $2,999, at 31 per cent. In the Rest of Alberta, standard spaces with an average rent between $2,000 and $2,499 were the most common, accounting for 35 per cent of the total universe.

Average Rent for Heavy Care Spaces

Heavy care spaces in Alberta reported an average rent of $3,784 per month in 2013, compared to $3,360 in 2012. As residents in heavy care spaces receive more health care services compared to those in standard spaces, the rental rates on average are higher. The highest rent for heavy care spaces in 2013 was in Edmonton at an average of $3,905 per month. In Calgary, the average rent was $3,774 in 2013 compared to $3,403 in 2012.

Figure 5



Source: CMHC

TABLES INCLUDED IN THE ALBERTA SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Alberta

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Calgary CMA	**	**	6.6	6.0	11.3	9.5	2.8	2.7	8.5	7.5
Edmonton CMA	**	**	11.5	7.0	9.1	6.9	16.5	8.6	11.4	7.3
Rest of Alberta	**	**	19.1	19.8	15.0	18.1	11.2	18.0	15.6	18.5
Alberta	**	**	**10.9**	**9.3**	**11.4**	**10.9**	**11.4**	**9.3**	**11.3**	**10.2**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range ($)
Alberta

Centre	Less than $1,500		$1,500 - $1999		$2,000 - $2,499		$2,500 - $2,999		$3,000 and more		Total where rents are known	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	0	0
Calgary CMA	**	**	4.3	0.0	12.0	3.9	7.7	11.3	8.9	7.0	8.5	7.5
Edmonton CMA	6.0	4.7	10.8	10.4	6.7	6.2	14.9	7.8	13.7	7.2	11.4	7.3
Rest of Alberta	9.4	6.0	18.4	20.1	12.7	16.2	19.7	16.5	15.9	25.3	15.6	18.5
Alberta	**6.8**	**4.9**	**11.4**	**14.1**	**10.6**	**10.0**	**13.3**	**10.9**	**11.2**	**9.8**	**11.3**	**10.2**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.3 Vacancy Rates (%) and Average Rents ($) of Heavy Care Spaces[1]
Alberta

Centre	Vacancy Rate		Average Rent	
	2012	2013	2012	2013
Calgary CMA	2.2	4.9	3,403	3,774
Edmonton CMA	1.1	2.3	3,465	3,905
Rest of Alberta	9.7	4.7	3,170	**
Alberta	**3.5**	**3.6**	**3,360**	**3,784**

[1] Non-market heavy care units are excluded from Average Rents, but are included in Vacancy Rate.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

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1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Alberta

Centre	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2012	2013				
Calgary CMA	3,421	7.3	6.9	26	3,434	. . . . .	. . . . .
Edmonton CMA	4,126	7.4	5.4	32	4,257	. . . . .	. . . . .
Rest of Alberta	2,613	13.6	14.8	35	2,436	. . . . .	. . . . .
Alberta	**10,160**	**8.9**	**8.3**	**93**	**10,127**	**198,600**	**5.1**

[1] Source: Table 11-10, Population by age group and sex, medium-growth - historical trends (1981 to 2008) scenario (M1) July 1st - Alberta, 2010 to 2036. Statistics Canada - Catalogue no. 91-520-X

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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2.1 Universe of Total Spaces by Unit Type
Alberta

Centre	Semi Private/ Bachelor	One Bedroom	Two Bedroom +	Total
Calgary CMA	1,527	1,558	336	3,421
Edmonton CMA	1,260	2,172	694	4,126
Rest of Alberta	1,001	1,290	322	2,613
Total Alberta	**3,788**	**5,020**	**1,352**	**10,160**

2.2 Universe by Unit Type
Alberta

Centre	Semi Private/ Bachelor	One Bedroom	Two Bedroom or more	Total
Calgary CMA	1,527	1,558	336	3,421
Standard Spaces	899	1,487	334	2,720
Non-Standard Spaces	628	71	2	701
Edmonton CMA	1,260	2,172	694	4,126
Standard Spaces	470	1,628	583	2,681
Non-Standard Spaces	790	544	111	1,445
Rest of Alberta	1,001	1,290	322	2,613
Standard Spaces	395	1,113	300	1,808
Non-Standard Spaces	606	177	22	805
Alberta	**3,788**	**5,020**	**1,352**	**10,160**
Standard Spaces	1,764	4,228	1,217	7,209
Non-Standard Spaces	2,024	792	135	2,951

2.3 Universe of Standard Spaces by Rent Range ($)
Alberta

Centre	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 - $2,999	$3,000 and more
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Calgary CMA	**	1.2	15.1	24.1	59.6
Edmonton CMA	16.1	13.3	14.5	31.4	24.8
Rest of Alberta	3.7	16.3	35.2	23.0	21.7
Alberta	**6.9**	**9.5**	**19.9**	**26.5**	**37.3**

[1] % is based on those spaces where the rent is known

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

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2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size Alberta

Centre	Meals				On-Site Medical Services	Registered Nurse onsite[2]	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Calgary CMA	0.0	11.5	11.5	76.9	50.0	46.2	96.2	23.1
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0	12.5	8.3	79.2	50.0	45.8	95.8	20.8
Edmonton CMA	**	**	**	**	**	**	92.6	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	100.0	**
90 or more	**	**	**	**	**	**	90.5	**
Rest of Alberta	0.0	20.0	11.4	68.6	65.7	42.9	94.3	5.7
10 - 49	0.0	30.0	30.0	40.0	60.0	40.0	80.0	10.0
50 - 89	0.0	23.1	7.7	69.2	76.9	46.2	100.0	7.7
90 or more	0.0	8.3	0.0	91.7	58.3	41.7	100.0	0.0
Alberta	**3.8**	**22.2**	**11.4**	**62.6**	**62.9**	**45.6**	**94.2**	**12.4**
10 - 49	0.0	**	26.8	35.8	64.2	35.8	82.1	8.9
50 - 89	0.0	**	**	53.5	69.6	**	100.0	9.6
90 or more	5.8	16.3	7.2	70.7	60.4	49.6	94.5	14.1

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] Registered Nurse on site means a RN, not a RPN or LPN.

2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size Alberta

Centre	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Calgary CMA	88.5	11.5	38.5	61.5	100.0	84.6
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	91.7	12.5	41.7	62.5	100.0	87.5
Edmonton CMA	**	**	**	**	85.2	**
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	**	0.0	**	**	85.7	**
Rest of Alberta	57.1	2.9	17.1	45.7	85.7	68.6
10 - 49	40.0	0.0	0.0	20.0	60.0	70.0
50 - 89	53.8	0.0	0.0	61.5	92.3	61.5
90 or more	75.0	8.3	50.0	50.0	100.0	75.0
Alberta	**66.6**	**5.6**	**23.6**	**45.9**	**89.5**	**68.6**
10 - 49	35.8	0.0	0.0	17.9	64.2	73.2
50 - 89	**	**	0.0	43.0	89.6	48.7
90 or more	80.1	6.6	36.0	52.0	94.2	74.6

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

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3.1 Average Rent ($) of Standard Spaces by Unit Type
Alberta

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Calgary CMA	**	**	2,435	2,622	3,273	3,506	3,951	4,321	3,075	3,314
Edmonton CMA	**	**	1,744	1,817	2,454	2,419	3,109	3,151	2,482	2,450
Rest of Alberta	**	**	1,821	1,874	2,488	2,530	3,097	3,355	2,399	2,525
Alberta	**	**	**2,108**	**2,228**	**2,761**	**2,839**	**3,352**	**3,533**	**2,691**	**2,798**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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O1 Building Structure Makeup (%)
Alberta

Centre	Concrete Frame	Wood Frame
Calgary CMA	34.6	65.4
Edmonton CMA	56.3	43.8
Rest of Alberta	22.9	77.1
Alberta	**37.6**	**62.4**

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)
Alberta

Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional ($)
Calgary CMA	Cable	38.5	30.8	30.8	40.00
	Telephone	7.7	65.4	26.9	34.57
Edmonton CMA	Cable	62.5	28.1	9.4	**
	Telephone	9.4	78.1	12.5	**
Rest of Alberta	Cable	40.0	25.7	34.3	30.92
	Telephone	14.3	68.6	17.1	39.67
Alberta	**Cable**	**47.3**	**28.0**	**24.7**	**35.17**
	Telephone	**10.8**	**71.0**	**18.3**	**37.29**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
Alberta

Centre	Before 1990	1990 - 1999	2000 or later	Total
Calgary CMA	**	6.3	7.9	7.5
Edmonton CMA	6.4	3.9	8.8	7.3
Rest of Alberta	**	19.5	18.3	18.5
Alberta	**6.9**	**8.0**	**11.6**	**10.2**

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O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Alberta

Centre		Before 1990	1990 - 1999	2000 or later	Total
Calgary CMA	Semi Private	**	**	**	**
	Bachelor	**	2,571	2,672	2,622
	One Bedroom	**	3,520	3,454	3,506
	Two Bedroom +	**	4,603	4,168	4,321
	All	**	3,127	3,399	3,314
Edmonton CMA	Semi Private	**	**	**	**
	Bachelor	**	2,410	1,821	1,817
	One Bedroom	1,635	2,755	2,673	2,419
	Two Bedroom +	**	**	3,236	3,151
	All	1,580	2,731	2,744	2,450
Rest of Alberta	Semi Private	**	**	**	**
	Bachelor	**	1,974	1,824	1,874
	One Bedroom	**	**	2,488	2,530
	Two Bedroom +	**	**	3,343	3,355
	All	**	2,457	2,538	2,525
Alberta	**Semi Private**	**	**	**	**
	Bachelor	**1,989**	**2,411**	**2,209**	**2,228**
	One Bedroom	**2,160**	**3,079**	**2,899**	**2,839**
	Two Bedroom +	**	**3,919**	**3,510**	**3,533**
	All	**2,161**	**2,864**	**2,913**	**2,798**

The following letter codes are used to indicate the reliability of the estimates:

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** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

Methodology
Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe. Non-profit residences must have at least one unit that is not subsidized.

To be eligible for inclusion in the 2013 survey results, a residence must:

- ✓ Have been in operation for at least one year, i.e., before January 2012
- ✓ Have at least 10 rental units (Quebec, Ontario, Prairies) or 5 rental units (Atlantic provinces and B.C.)
- ✓ Offer an on-site meal plan
- ✓ Not provide high levels of healthcare (defined as 1.5 hours or more of care per day) to all of their residents. Nursing homes and long-term care homes are examples of residences that were not included in the survey.
- ✓ Offer rental units. Life lease units and owner-occupied units are excluded from this survey.
- ✓ Have at least 50% of residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey, therefore, all seniors' residences in Canada meeting these criteria are included to be part of this survey.

Survey data were obtained through a combination of telephone interviews and fax and email responses. Information was obtained from the owner, manager, or residence administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions
Space: A space is a residential area that is rented out. Examples of spaces include: one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard Space: A space where the resident does not receive high-level care (i.e., the resident receives less than 1.5 hours of care per day.) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy Care Space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples include Alzheimer, Dementia and mobility support residents.

Respite Space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or Subsidy Space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: Refers to the actual amount a resident pays per month for their accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture Rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the cooperation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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